

FEDERATION OF TAX ADMINISTRATORS

**22ND ANNUAL
TECHNOLOGY CONFERENCE
AND EXHIBITION**



**August 13-16, 2006
Albuquerque, New Mexico**

[Hyatt Floor Plan]

Welcome

Welcome to the 22nd Annual FTA Technology Conference and Exhibition in New Mexico, the Land of Enchantment. We are again providing our annual opportunity for government revenue professionals, service providers and taxpayer representatives to gather together and learn about new initiatives, discuss issues of interest and get information on new products and services in the tax and revenue marketplace.

The conference features a full agenda of sessions on new initiatives of government tax authorities, descriptions of technology applications and standards and remarks by industry providers on a variety of topics important to the tax administration community. This year we are offering significant sessions on data warehousing, modernized Fed-State E-filing, streamlined sales tax and data capture technologies.

This year we have changed to a Monday-Tuesday Exhibit Hall schedule in response to your requests. You will find that our Hall contains a wealth of information about potentially valuable services to you. The Hall will be open on Monday from 5 to 8 p.m. and continuously on Tuesday from 7:30 a.m. to 1:30 p.m., including an extended luncheon. We again wish to thank our roster of Sponsors and Exhibitors for their significant support.

We also wish to welcome the members of National Association of Computerized Tax Processors (NACTP), which for the twelfth year has co-located its annual meeting with FTA during the latter half of the week here in the Hyatt. In addition, some of you are attending the ASC X12/TIGERS working group meeting later this week, which will address agreement on jointly developed XML-based state and federal electronic commerce standards for personal, corporate, employment and sales taxes that are important to all tax agencies and their partners. Finally, we want to express our thanks to all of our speakers for their willingness to share their time and expertise.

As always, we hope this year's FTA Annual Technology Conference and Exhibition assists you in your new technology efforts and that you find the time to enjoy the many and varied attractions of Albuquerque.

Harley T. Duncan
FTA Executive Director

FTA 2006 Technology Conference

Sponsors and Exhibitors

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Taxware LP		108
Teradata, a division of NCR	*Gold Sponsor*	217
Universal Tax System, Inc.		205
Virtual Solutions, Inc.	*Bronze Sponsor*	224

[Exhibit Hall]

DAY AT A GLANCE

Sunday, August 13, 2006

3:00 p.m. – 7:00 p.m. Conference and Sponsor/Exhibitor Registration – Hyatt Albuquerque
- *Pavilion Landing*

6:30 p.m. – 8:00 p.m. Opening Reception – Hyatt Albuquerque - *Enchantment Ballroom*

Monday, August 14, 2006

7:00 a.m. – 5:00 p.m. Conference and Sponsor/Exhibitor Registration – Hyatt Albuquerque
- *Pavilion Landing*

7:30 a.m. – 8:45 a.m. Sponsor Continental Breakfast – Albuquerque Convention Center –
Ballroom A

9:00 a.m. – 10:30 a.m. GENERAL SESSION - Albuquerque Convention Center –
Ballroom A

11:00 a.m. – Noon CONCURRENT SESSIONS

Session 1 *Fiesta*
Session 2 *Enchantment A-D*
Session 3 *Sendero 1*
Session 4 *Sendero 3*
Session 5 *Sendero 2*

Noon – 5:00 p.m. Vendor Setup ONLY – Hyatt Albuquerque - *Grand Pavilion*
Ballroom

1:30 p.m. – 5:00 p.m. CONCURRENT SESSIONS

Session 1 *Fiesta*
Session 2 *Enchantment A-D*
Session 3 *Sendero 1*
Session 4 *Sendero 3*
Session 5 *Sendero 2*

5:00 p.m. – 8:00 p.m. Conference Reception – Hyatt Albuquerque - Exhibit Hall, *Grand*
Pavilion Ballroom

Schedule for Monday, August 14, 2006

7:00 a.m. – 5:00 p.m. Conference and Sponsor/Exhibitor Registration – Hyatt Albuquerque
- *Pavilion Landing*

7:30 a.m. – 8:45 a.m. Sponsor Continental Breakfast–Albuquerque Convention Center –
Ballroom A

9:00 a.m. – 10:30 a.m. **General Session** – Albuquerque Convention Center – *Ballroom A*

Introductions

Jonathan Lyon, Federation of Tax Administrators

Welcome to New Mexico

Jan Goodwin, Secretary, New Mexico Taxation and Revenue
Department

Keynote: Strategies to Achieve Success in Major IT Initiatives -

Lee Mikelson, Functional Design and Testing Manager, Virginia
Department of Taxation

11:00 a.m. – Noon CONCURRENT SESSIONS – Hyatt Albuquerque

SESSION 1 *Fiesta*

**Benefits of Using Standards to Increase Your e-Program
Participation** - Julia Ortiz, DISA

SESSION 2 *Enchantment A-D*

Latest Developments in Internet & IT Security Law
Ben Wright, Attorney At Law

SESSION 3 *Sendero 1*

Tax Compliance: Yesterday and Tomorrow – Tom Heinz, RSI

SESSION 4 *Sendero 3*

FTA-IRS Tactical Advisory Group Update - Tim Blevins, Kansas,
and Peter Maser, IRS

SESSION 5 *Sendero 2*

New Tax Discovery Programs – Pam Fair, Louisiana

Noon – 5:00 p.m. Vendor Setup ONLY – Hyatt Albuquerque - *Grand Pavilion Ballroom*

Noon – 1:30 p.m. Lunch (on your own)

1:30 p.m. – 2:30 p.m.

CONCURRENT SESSIONS

SESSION 1 *Fiesta*
XML "101" - Terry Garber, South Carolina

SESSION 2 *Enchantment A-D*
Decision Analytics and the Future of Taxpayer Compliance Management – John McCalden, RSI

SESSION 3 *Sendero 1*
Challenges and Recommendations for Managing Virtual Teams
- Daniel Tuten, Georgia

SESSION 4 *Sendero 3*
TAG's Security Subcommittee: Cooperative Security Practices Review Work - Tim Blevins, Kansas

SESSION 5 *Sendero 2*
Sponsor Solution Series #1: Data Driven Performance Management - Karla Pierce, Microsoft

2:45 p.m. – 3:45 p.m.

CONCURRENT SESSIONS

SESSION 1 *Fiesta*
Web Services "101" – David McDonald, Microsoft

SESSION 2 *Enchantment A-D*
Wisconsin's Path to Integrated Tax Administration - Vicki Siekert and Oscar Anderson, Wisconsin

SESSION 3 *Sendero 1*
Hear from the First Government Agency (in the world) to Achieve ITIL Certification! - Paul Broderick, Victoria, Australia

SESSION 4 *Sendero 3*
NPRC Recommendations for State e-file Systems - Peter Isberg and Anita Gross, National Payroll Reporting Consortium

SESSION 5 *Sendero 2*
Sponsor Solution Series #2: Achieving Higher Compliance Levels – Paul Panariello, Revenue Solutions

4:00 p.m. – 5:00 pm

CONCURRENT SESSIONS

SESSION 1 *Fiesta*
Fed-State Modernized E-file Development Update - Joan Barr,
IRS, and Terry Garber, South Carolina

SESSION 2 *Enchantment A-D*
Predictive Tax Compliance – Bill Haffey, SPSS, and John Vranna,
CGI-AMS

SESSION 3 *Sendero 1*
**Integrating Your Data Warehouse - Beyond Data Mart
Consolidation** - Alison Torres, Teradata

SESSION 4 *Sendero 3*
**Increasing Tax Revenues Without Raising Taxes: How the
Latest Authentication Technologies Can Help In Maximizing
Tax Collection** - Rob Saiter, Authentix

SESSION 5 *Sendero 2*
**Sponsor Solution Series #3: MasterCard Convenience Fee
Program Overview** – Jim Reed, MasterCard

5:00 p.m. – 8:00 p.m.

Conference Reception – Exhibit Hall – *Grand Pavilion Ballroom*

DAY AT A GLANCE

Tuesday, August 15, 2006

- 7:30 a.m. – 5:00 p.m. Conference Registration – Pavilion Landing
- 7:30 a.m. – 8:30 a.m. Continental Breakfast–Exhibit Hall - Grand Pavilion Ballroom
- 8:30 a.m. – 11:00 a.m. CONCURRENT SESSIONS
Session 1 *Fiesta*
Session 2 *Enchantment A-D*
Session 3 *Sendero 1*
Session 4 *Sendero 3*
- 11:00 a.m. – 1:30 p.m. Lunch and Vendor Exhibits – *Grand Pavilion Ballroom*
- 1:30 p.m. – 6:00 p.m. Exhibit Teardown
- 1:30 p.m. – 5:00 p.m. CONCURRENT SESSIONS
Session 1 *Fiesta*
Session 2 *Enchantment A-D*
Session 3 *Sendero 1*
Session 4 *Sendero 3*

Schedule for Tuesday, August 15, 2006

- 7:30 a.m. – 3:00 p.m. Conference Registration – Pavilion Landing
- 7:30 a.m. – 8:30 a.m. Continental Breakfast – Exhibit Hall - Grand Pavilion Ballroom
- 8:30 a.m. – 9:30 a.m. CONCURRENT SESSIONS
- SESSION 1 *Fiesta*
Fed-State Modernized E-file Development - An MeF "Level 101 How-To" – Panel – DonnaJean Muccilli, Arizona; Terry Hunt, Kansas; John Dobis and Joyce Curry, New York; Scott Mueller, Wisconsin; Terry Garber, South Carolina; and Joan Barr, IRS
- SESSION 2 *Enchantment A-D*
E-Services and Payroll Industry Reporting -
Andrew McDevitt, Intuit
- SESSION 3 *Sendero 1*
Successfully Implementing Imaging and Content Management at the Hawaii Tax Department – Robert Tross, CGI-AMS
- SESSION 4 *Sendero 3*
Advanced Collections Analytics - Shaun Barry, IBM
- 9:45 a.m. – 10:45 a.m. CONCURRENT SESSIONS
- SESSION 1 *Fiesta*
Progress on Development of Streamlined Sales Tax - Gary Centlivre, Kansas, David Thompson, Tennessee, and Ed Phillips, Ohio
- SESSION 2 *Enchantment A-D*
New York's Empire Project and Services-Oriented Architecture (SOA) - James Lieb, New York
- SESSION 3 *Sendero 1*
Best Practices of Barcoded Forms and PDF417 Barcodes / Creating Tagged 508 Compliant PDFs – Lee Sutton, Adobe
- SESSION 4 *Sendero 3*
Sponsor Solution Series #4: Got Policy? The Role of Policy in Integrated Tax System Implementation – Jake Hoffman, Fast Enterprises
- 11:00 a.m. – 1:30 p.m. Lunch and Vendor Exhibits – *Grand Pavilion Ballroom*

1:30 p.m. – 6:00 p.m.

EXHIBIT TEARDOWN

1:30 p.m. – 2:30 p.m.

CONCURRENT SESSIONS

SESSION 1 *Fiesta*

Accurate Tax Jurisdiction Determination - George Rebhan,
Proxix Solutions

SESSION 2 *Enchantment A-D*

Are Service-Oriented Architectures the Future of Tax Agencies?
– Hemant Sharma, CGI-AMS

SESSION 3 **(GOVT. ONLY)** *Sendero 1*

State Forms Coordinator Session - Mitzi Crump, Missouri,
Moderator

SESSION 4 *Sendero 3*

**Sponsor Solution Series #5: Addressing the Challenges of the
21st Century Tax and Revenue Administration** – Jim Evers,
Florida and George Mitchell, Deloitte

2:45 p.m. – 3:45 p.m.

CONCURRENT SESSIONS

SESSION 1 *Fiesta*

The SOA Era: Building the Foundation for High Performance
- Melissa Laughlin, Accenture

SESSION 2 *Enchantment A-D*

The Free Open-Source Tax Software Project - Richard L.
Braman Jr., Tax Code Software Foundation

SESSION 3 **(GOVT. ONLY)** *Sendero 1*

State Forms Coordinator Session - Mitzi Crump, Missouri,
Moderator

SESSION 4 *Sendero 3*

**Sponsor Solution Series #6: Lessons Learned: How to Avoid
Common Mistakes in Tax Implementations** - George Love, SPL

4:00 p.m. – 5:00 p.m.

CONCURRENT SESSIONS

SESSION 1 *Fiesta*

Inside the SC DOR Data Warehouse Project - Terry Garber,
South Carolina, and Paul Morris, RSI

SESSION 2 *Enchantment A-D*

Guest Worker Compliance - Barbara Bostian, Randy Barnes, and Alan Felton, North Carolina

SESSION 3 **(GOVT. ONLY)** *Sendero 1*

State Forms Coordinator Session - Mitzi Crump, Missouri, Moderator

SESSION 4 *Sendero 3*

Sponsor Solution Series #7: Representative, Teradata

DAY AT A GLANCE

Wednesday, August 16, 2006

- 7:30 a.m. – 10 a.m. Conference Registration
- 7:30 a.m. – 8:30 a.m. Networking/Topic Table/Continental Breakfast – *Enchantment Ballroom*
- 8:30 a.m. – Noon CONCURRENT SESSIONS
- Session 1 *Fiesta*
 - Session 2 *Sendero 1*
 - Session 3 *Sendero 3*
 - Session 4 *Sendero 2*

[FTA TECHNOLOGY CONFERENCE CLOSE]

- 1:00 p.m. – 5:00 p.m. XML Standards Working Meeting – Tax Information Group for EC Requirements Standardization (TIGERS) – *Enchantment E-F*

Schedule for Wednesday, August 16, 2006
(NOTE: NACTP also meets August 16-18 in the Hotel)

- 7:30 a.m. – 10 a.m. Conference Registration
- 7:30 a.m. – 8:30 a.m. Networking/Topic Table/Continental Breakfast – *Enchantment Ballroom*
- 8:30 a.m. – 9:30 a.m. CONCURRENT SESSIONS
- SESSION 1 *Fiesta*
Best Practices to Manage Debt Collections in the Public and Private Sector - Ted London, CGI-AMS
- SESSION 2 *Sendero 1*
South Carolina Business One Stop: Architecture of a Cross-Agency Success Story - Dave Friedline, TiBA Solutions
- SESSION 3 *Sendero 3*
Commerce Software and Robust Business Intelligence – James Lieb, New York
- SESSION 4 *Sendero 2*
Use of Tablet PCs for Field Collections – Peggy Moss and Earl Millet, Louisiana
- 9:45 a.m. – 10:45 a.m. CONCURRENT SESSIONS
- SESSION 1 *Fiesta*
Sales Tax Exceptions Processing System - Roger Cohen, New York
- SESSION 2 *Sendero 1*
Generating Statistically Sound Random Samples in the Conduct of Transaction-Based Audits - Dawn Baldwin and Krister Hertz, Bull IS
- SESSION 3 *Sendero 3*
Streamlining Global Tax Automation - John Beaty, FuelQuest
- SESSION 4 *Sendero 2*
Sponsor Solution Series #8: The SOA Era: Building the Foundation for High Performance – Representative, Accenture

11:00 a.m. – Noon

CONCURRENT SESSIONS

SESSION 1 *Fiesta*

IRS.Gov and Use of Web Management Tools – Bert Dumars,
Director, ETA, IRS

SESSION 2 *Sendero 1*

Implementing a Successful Project Management Office (PMO) -
Barbara Bostian, North Carolina

SESSION 3 **(GOVT. ONLY)** *Sendero 3*

**Continued Progress on Modernizing the IRS-State Data
Exchange Program** - Rod Sterling, IRS

Session 4 *Sendero 2*

**Sponsor Solution Series #9: Governmental Revenue
Management Solutions - Are they really integrated?** - Kevin
Fenner and Calvin Tu, Oracle

[FTA TECHNOLOGY CONFERENCE CLOSE]

Wednesday, August 16, 2006

1:00 p.m. – 5:00 p.m.

XML Standards Working Meeting – Tax Information Group for EC
Requirements Standardization (TIGERS) – *Pavilion 6*

Schedule for TIGERS Meeting

Wednesday, August 16, 2006

1:00 p.m. – 5:00 p.m.

ASC X12/TIGERS Tax Information Task Group – XML Standards – *Pavilion 6*

Further Work on Fed-State 1120/1065 E-File

- IRS Program Status
- Strong Authentication
- WSDL Changes
- State Schema Development
 - Spreadsheet Results
 - Schema Review
 - Timeline

Thursday, August 17, 2006

9:00 a.m. – 5:00 p.m.

ASC X12/TIGERS Work Sessions – XML Standards – *Pavilion 6*

Further Work on Fed/State 1040 E-File

(Joint session with NACTP approximately 10-11:00 a.m.)

- IRS Status Update
- Joint Panel With NACTP
- Category Recap
- Complex Type Development

Friday, August 18, 2006

9:00 a.m. – 5:00 p.m.

ASC X12/TIGERS Work Sessions – XML Standards – *Pavilion 6*

Further Work on Fed-State Employment Tax (FSET)

- Survey Status
- FSET 2.1 Changes
- EFTPS IPS Discussion
- Enrollment Schema
- Registration Schema



FTA Home Page:
www.taxadmin.org
for meeting information
... and much more ...

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